

## Digital Tip

### Digitally Enhancing Formal Reports

Many organizations publish formal reports as PDF files or Web documents. By taking advantage of these digital media, you can add functionality to a report.

Digital versions of formal reports can offer tables of contents that link directly to the individual sections within a report. You can add hyperlinks or mouseover elements that provide definitions of specialized terms or links to supplemental information. Further enhancements could include interactive components, such as forms and graphics that readers can manipulate.

While the word processing software that you choose will limit your choices of digital enhancements, you can expect the following options:

- *In-Document & Web Links*
- *Enhanced Presentation of Supplemental Information*

As you decide what options are best suited for your report, consider your audience, purpose, and how your report will be published (such as on the Web or as an e-mail attachment to a limited audience). For additional considerations, see the section at the end of this document:

- *Considerations for Digitally Enhancing Formal Reports*

## In-Document & Web Links

Formal reports published as digital media can incorporate links within the document to other areas of the document or to outside Web sites or e-mail addresses.

**To create an In-Document link from one section of your report to another**, first click where you want the reader to be taken when they click your In-Document link. Then, find the “Bookmark” option in your word processor. In Microsoft Word, this option is located in the Insert menu (Figure 1).

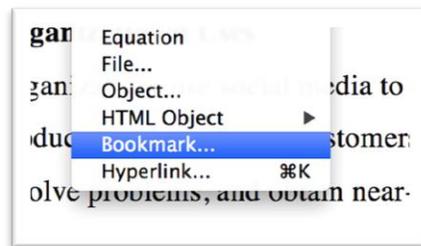


Figure 1.

Once you click on “Bookmark,” your word processor will display a screen similar to the one shown in Figure 2. This screen gives you the ability to add an invisible bookmark within your document. Next, enter a unique name for the bookmark in the “Bookmark Name” field. Ensure that the “Hidden bookmarks” checkbox is checked and then click the “Add” button. Once done, click the “Close” button.

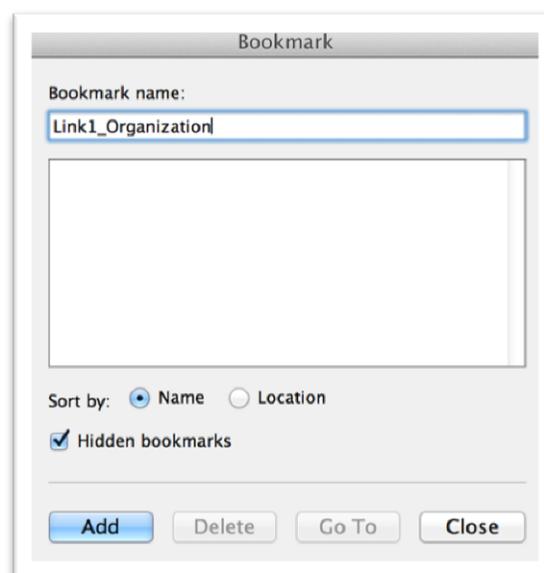


Figure 2.

Next, select the word or phrase that you want your readers to click on to be taken to the section of the document that you just marked as a bookmark. To do this, hold the mouse button down to the left of the word and then drag your mouse to the right. Once highlighted, find the “Cross-reference” option in your word processor. In Microsoft Word, this option is located in the Insert menu (Figure 3).

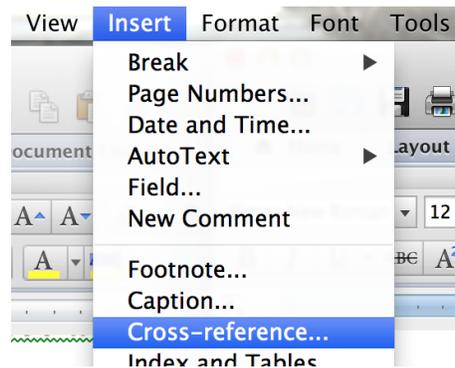


Figure 3.

Once you click on “Cross-reference,” your word processor will display a screen similar to the one shown in Figure 4. In the “Reference type:” menu, select “Bookmark” and then click on the name of the bookmark that you just created. Next, ensure that “Insert as hyperlink” is checked and then click the “Insert” button. Once done, your readers will be able to click on the text that you selected and be taken instantly to the place where the bookmark is located within your document.

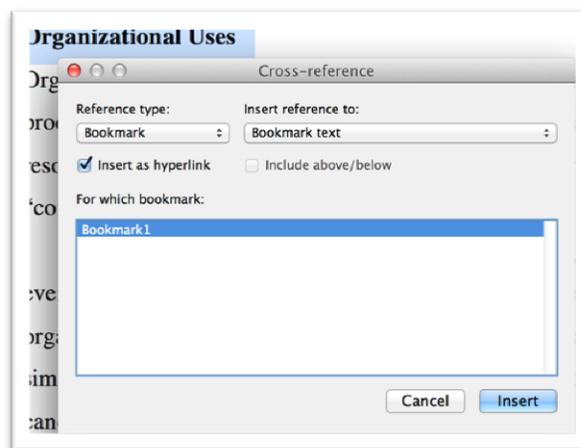


Figure 4.

If you are using your word processor’s tools for headings, subheadings, footnotes, endnotes, figures, or tables, you can also create In-Document links directly to those items. To do so, follow the instructions above, but select the tool that you are using, such as “Headings” instead of “Bookmarks,” from the “Cross-reference” screen.

**To create a link to an outside Web page**, first select the word or phrase that you want your readers to click on. To do this, hold the mouse button down to the left of the word and then drag your mouse to the right. Once highlighted, find the “Hyperlink” or “Web Link” option in your word processor. In Microsoft Word, this option is located in the Insert menu (Figure 5).

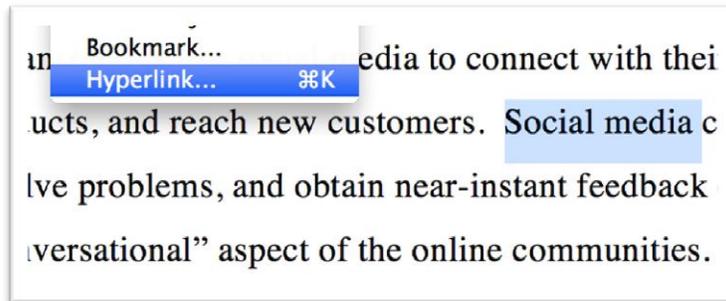


Figure 5.

Once you click on “Hyperlink,” your word processor will display a screen similar to the one shown in Figure 6. The screen gives you the ability to link to an outside Web site, to another document, or to an e-mail address. In other words, if your reader clicks the link, they will either be taken to the Web site that you specify, to another document located on the same computer as your report, or to their e-mail program in order to compose an e-mail.

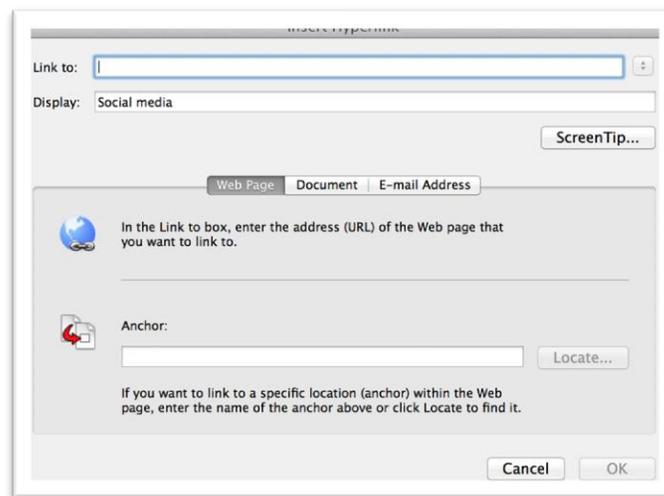


Figure 6.

To create a link to an outside Web site, type in the URL or Web address of the Web site in the “Link to:” field. For example, if you wanted the reader to click on your highlighted text and be taken to the Bedford/St. Martin’s Web page, you would enter “www.bedfordstmartins.com” in the “Link to:” field. Once done, click the “OK” button.

To create a link to another document, click on “Document” in the middle of the “Insert Hyperlink” window and then click “Browse” to find the document. Similarly, to create a link to your reader’s e-mail program, click on “E-mail” in the middle of the “Insert Hyperlink” window and then enter the e-mail address for the recipient and the subject of the e-mail that you wish to be sent. Once done, click the “OK” button. The link will immediately appear, in blue, within your document.

Depending on your conversion tool, your In-Document links and Web links may be preserved if you convert your word processing document to an Adobe Acrobat PDF document.

## The Enhanced Presentation of Supplemental Information

Because formal reports published in a digital media format are not limited in the same way as a static, printed document, many different types of interactive visuals can be added. Audio and video components can provide your reader with information that would be unavailable in a traditional, printed report. Automatically-linked tables of contents and indexes and the definition of words through mouseovers further provide your readers with additional information not available in printed reports.

Depending on the topic of your formal report, an audio or video component might help the reader better understand your subject. For example, a highly technical report could contain a movie that shows how a specific part is constructed, or a report that focuses on working with a specific type of animal might benefit from the inclusion of the sounds that that animal makes.

**To add an audio or video component to your formal report**, you will first need to obtain or prepare that audio or video file. On an Apple Mac computer, programs such as iMovie or Garage Band can be used to produce high quality movie or audio files. Similarly, programs such as Movie Maker or Sound Recorder on Windows computers can serve the same purpose.

Once you have an audio or video file to include in your formal report, move the cursor to the place within the report where you would like the video or audio to appear. Then, click on the “Insert Video from File” or “Insert Audio from File” option in your word processor. In Microsoft Word, both are found in the Insert menu (Figure 7).

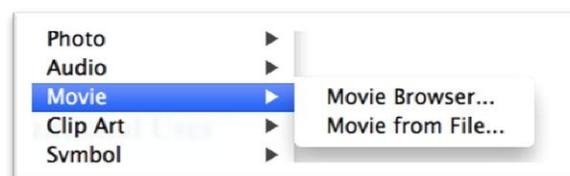


Figure 7.

Next, select the audio or video file that you want to include from the file selection window (Figure 8).

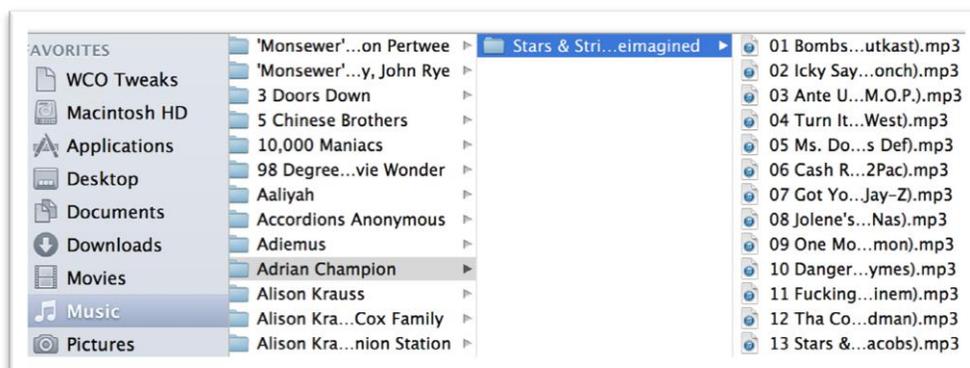


Figure 8.

Finally, use the “Format Picture” options in your word processor to control the look and placement of the icon that your readers will click on to view the included movie or to listen to the included audio file (Figure 9). Be sure to reference the video or audio file within your formal report to ensure that your reader knows both that the file is available and why you are including the video or audio component.

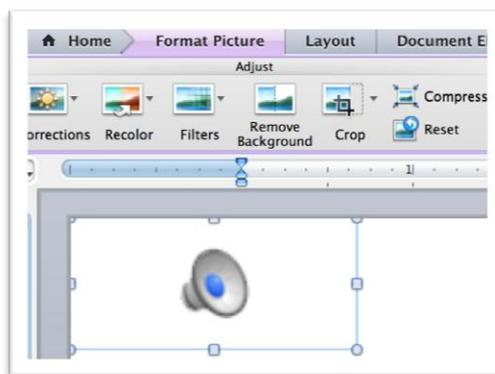


Figure 9.

**To automatically create a linked table of contents**, first identify the text in your report that you want to appear in the table of contents. In Microsoft Word, you do this by marking your section headers and sub-headers throughout the document. To do this, hold the mouse button down to the left of the word or phrase that you want included in your table of contents and then drag your mouse to the right. Then, click on the appropriate heading level in the “Styles” menu. Use “Heading 1” for your main section headers and “Heading 2” for your sub-headers (Figure 10).

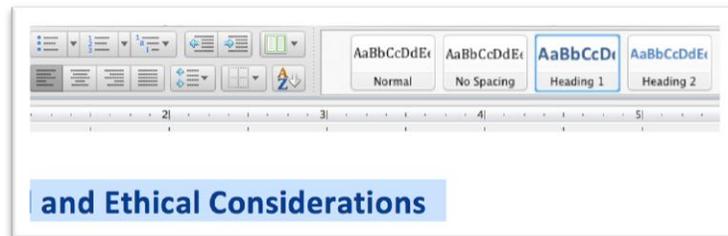


Figure 10.

Next, move your cursor to where in your document you want the table of contents to appear. Then, find the “table of contents” menu in your word processor. In Microsoft Word, this option is located in the “Insert” menu by clicking on “Index and Tables.”

In the resulting “Index and Tables” screen (Figure 11), click on “Table of Contents,” change any of the formatting options as needed, and then click the “OK” button. Once done, your word processor will create a table of contents for you and will automatically link each entry to the appropriate section within your formal report.



Figure 11.

**To automatically create a linked index**, you will follow almost the exact same procedure as described above for creating a table of contents. First, mark each word that should appear in your index. In Microsoft Word, do this by selecting the word and then clicking the “Mark Entry” button in the “References” and “Index” menu. Next, position the cursor where you would like the index to appear and then click choose the “Index and Tables” menu. Finally, select “Index,” change any of the formatting options as needed, and then click the “OK” button. Once done, your word processor will create an index for you and will automatically link each entry to those words within your report.

**To create a mouseover definition,** select the word or phrase that should have a definition appear when your reader hovers their mouse over the word or phrase. To do this, hold the mouse button down to the left of the word and then drag your mouse to the right. Then, find the “Bookmark” option in your word processor. In Microsoft Word, this option is located in the Insert menu (Figure 12).

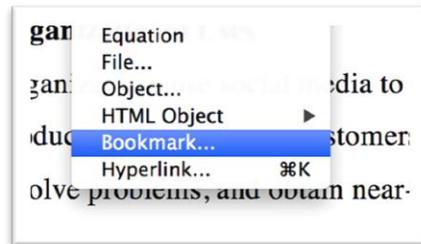


Figure 12.

Once you click on “Bookmark,” your word processor will display a screen similar to the one shown in Figure 13. Next, enter a unique name for the bookmark in the “Bookmark Name” field. Ensure that the “Hidden bookmarks” checkbox is not checked and then click the “Add” button. Once done, click the “Close” button.

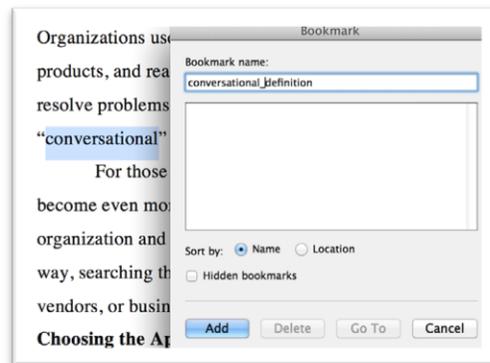


Figure 13.

Next, with the word or phrase still selected, find the “Hyperlink” or “Web Link” option in your word processor. In Microsoft Word, this option is located in the Insert menu. Then, select the “Tool Tip” or “ScreenTip” option, enter the definition of your selected word, and click “OK” (Figure 14).

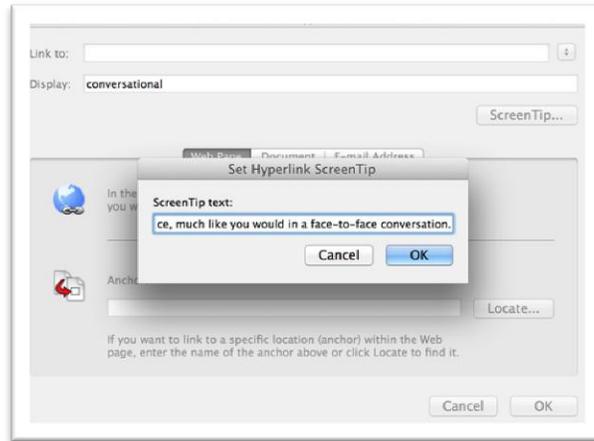


Figure 14.

Once done, your word processor will automatically insert a mouseover that will allow your readers to see the definition that you entered by hovering their mouse over the text that you selected (Figure 15). This is useful for defining words or phrases within your report that some of your readers may know, but that others might not understand.

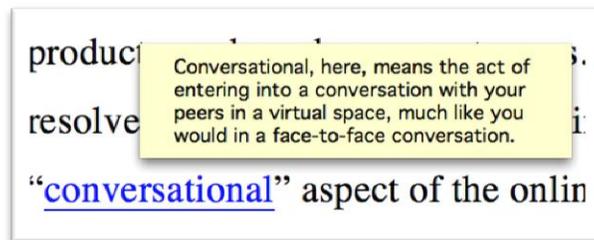


Figure 15.

## Considerations for Digitally Enhancing Formal Reports

As you work to digitally enhance your formal reports, review the following considerations:

- *Always consider how a digital enhancement will make your report better.* Do not succumb to the temptation of adding video, audio, or links simply because they are available. Rather, only add digital enhancements if the addition of the enhancement is warranted by your considerations of audience and purpose.
- *Be sure to test your digital enhancements in a variety of “readers.”* Different versions of operating systems, word processing programs, and Adobe Acrobat PDF readers handle digital enhancements in different ways. Therefore, be sure to test your final report in a variety of “readers,” especially those that you expect your audience to use. If an included enhancement requires a specific software program, be sure to mention that within the report.
- *Always introduce your digital enhancements.* Don’t simply put an icon within your report and expect your reader to click it. Rather, explain what the icon or enhancement is for, what information it provides, and how the reader can access it.
- *Carefully consider the readability of the report if your enhancements are ignored.* Some readers will be unable or unwilling to use your digital enhancements. Ensure that your formal report will make sense to those readers.
- *Never include digital enhancements that you don’t have the right to use.* If you are using music or video or other visuals, ensure that you can legally use those elements in your report. Be sure that the copyright for all included enhancements allows for their use in your report.